

71-4653
2 DEC 1971

MEMORANDUM FOR: Executive Director-Comptroller

Executive Registry

SUBJECT : Action Proposal for Implementing Early Retirement
Policy for Contract Employees and Career Agents

1. At the Deputies' meeting on 16 December 1970, it was agreed that the Agency's early retirement policy applicable to staff personnel under the Civil Service Retirement System would be extended to contract employees and career agents. The Director of Personnel, with the assistance of the Office of General Counsel, was assigned responsibility for preparing an implementing action proposal. Our proposal is attached.

2. The Deputy General Counsel has suggested that extension requests for career agents might go to the Executive Director-Comptroller for approval rather than the Director. However, there are only about [REDACTED] on-board Agency career agents. Exception requests for this small group should be few in number. Setting up a separate approval channel to handle them might well be an unnecessary complication. 25X

3. We have all given considerable thought to the problem of handling those employees who will be in or past the retirement zone when the policy goes into effect. Fortunately, here again, the number is small. Projected through 1972, Office of Personnel records indicate [REDACTED] contract employees and career agents under the Civil Service Retirement System age 55 and above. Also, this initial problem is self-liquidating and will not reoccur. We have, therefore, recommended that Deputy Directors be given substantial latitude in establishing individual retirement dates for these individuals. 25

/s/Harry B. Fisher

Harry B. Fisher
Director of Personnel

Attachment

Distribution:

Original - Addressee

1 - ER

1 - DDS

1 - OGC

1 - RAD

1 - DD/Pers/SP

1 - D/Pers Chrono

1 - D/Pers Subject File

2 - CPD

OP/CPD/ [REDACTED]

25X1A

(29 Nov 71)

Executive Registry

71-6157
2 DEC 1970

MEMORANDUM FOR: Executive Director-Comptroller

SUBJECT : Action Proposal for Implementing Early Retirement
Policy for Contract Employees and Career Agents

1. This memorandum submits a recommendation for your approval; such recommendation is contained in paragraph 4.

2. At the Deputies' meeting on 16 December 1970, it was agreed that the Agency's early retirement policy applicable to staff personnel under the Civil Service Retirement System would be extended to contract employees and career agents. Exception requests for career agents will be submitted to the Director in conformance with procedures established for staff personnel. However, the Deputy Directors would be authorized to approve exceptions to the policy for contract employees and would notify the Director of Personnel in such cases. It was recognized that certain administrative adjustments would have to be made to implement this policy change. The Director of Personnel, with the assistance of the Office of General Counsel, was assigned responsibility for preparing an implementing action proposal. This proposal follows:

- 25X1A
- a. Modify [REDACTED] Civil Service Retirement System, to clearly state Agency policy applicable to contract personnel. While substantive in nature, the revision is simple and should not pose any regulatory coordination problem. See Tab A.
 - b. Inform on-board contract employees and career agents as well as new EOD contract personnel of the Agency's early retirement policy. We propose on-board employees be notified by an individual amendment to their contract which they will be asked to acknowledge. The language is set out in Tab B. paragraph A. (2). Contracts for new EOD's would contain both paragraphs of Tab B.
 - c. Establish a system to notify an individual of the date he is expected to retire. We propose that the system in being for staff personnel be used for contract personnel to the greatest extent possible. This would involve a five-year letter to contract individuals entering the retirement zone. To avoid the possibility of construing the receipt of a letter as a guarantee of employment for the full five-year period, we would modify the letters in current use along the lines set out in Tab C.

SECRET

GROUP 1
Excluded from automatic
downgrading and
declassification

6. Set out a working procedure to establish retirement dates for individuals in or past the retirement zone when the new policy goes into effect. A special problem is encountered for these individuals. Protected through 1972, Office of Personnel records indicate [REDACTED] contract employees and career agents under the Civil Service Retirement System age 55 and above [REDACTED] career [REDACTED]

Because of their age these individuals may not get a full five-year letter. We suggest their retirement be handled as follows:

(1) Contract Employees. Deputy Directors be authorized to establish an individual retirement date for each such contract employee. This is consistent with the authority of Deputy Directors to approve extension exceptions for contract employees as set out in paragraph 2. above.

(2) Career Agents. Deputy Directors be delegated authority to establish an individual retirement date for each career agent who is either beyond his regulatory early retirement date or has less than three years remaining before he reaches that regulatory date. (Employees generally will retire at age 60 or as soon thereafter as they are eligible for optional retirement under the Civil Service Retirement System, i. e., upon completion of 20 years of service at age 60 or after a minimum of five years of service at age 62.) This delegated authority would only be used when a total notice period not exceeding three years is desired. If a longer notice period is requested, the case would be submitted to the Director. An early retirement date previously established for a staff employee will not change following his conversion to career agent.

3. It should be emphasized that this paper does not deal in any way with contract employees and career agents covered under the CIA Retirement and Disability System (CIARDS). [REDACTED] clearly indicates that CIARDS' early retirement provisions apply to all participants in that system, whether staff or contract.

SECRET

It is recommended that you approve the proposed course of action outlined in paragraph 2. above.

/s/Harry B. Fisher

Harry B. Fisher
Director of Personnel

CONCUR:

/s/Lawrence R. Houston

Lawrence R. Houston
General Counsel

6 DEC 1971

Date

The recommendation contained in paragraph 4. is approved:

E. K. White

L. K. White
Executive Director-Comptroller

16 DEC 1971

Date

Distribution:

Original - Return to D/Pers

- 1 - ER
- 1 - DDS
- 1 - OGC
- 1 - RAD
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- 1 - D/Pers Chrono
- 1 - D/Pers Subject File
- 2 - CPD

OP/CPD/ [REDACTED] :rsw (29 Nov 71)

SECRET

Approved For Release 2001/05/23 : CIA-RDP84-00688R000200240001-8

A

Approved For Release 2001/05/23 : CIA-RDP84-00688R000200240001-8

25X1A

Current

- b. POLICY. Employees generally will retire at age 60 or as soon thereafter as they are eligible for optional retirement under the Civil Service Retirement System, i. e., upon completion of 20 years of service at age 60 or after a minimum of five years of service at age 62. Exceptions to the general policy will be considered by the Director on an individual case basis when requested by a Deputy Director, Head of a Career Service, Head of Independent Office, or the employee. See paragraph c. below.

25X1A

Proposed

- b. POLICY. Appointed employees, Career Agents and Contract Employees generally will retire at age 60 or as soon thereafter as they are eligible for optional retirement under the Civil Service Retirement System, i. e., upon completion of 20 years of service at age 60 or after a minimum of five years of service at age 62. Exceptions to this policy for appointed employees and Career Agents will be considered by the Director on an individual case basis when requested by a Deputy Director, Head of a Career Service, Head of Independent Office, or the employee. See paragraph c. below. Exceptions to this policy for Contract Employees will be considered by the Deputy Director concerned on an individual case basis. He will inform the Director of Personnel when an extension has been granted as well as the reason therefor.

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B

Approved For Release 2001/05/23 : CIA-RDP84-00688R000200240001-8

SECRET

TAB - B

(A) (1) By virtue of the employment relationship established in this contract you will participate in the Civil Service Retirement System. Your participation, the payment of required employee contributions and the like, will be handled in conformance with the procedures of this organization.

(A) (2) Unless this contract is sooner terminated by either party hereto, it is specifically understood and agreed that you will retire in accordance with the retirement policy of this organization. For your information, current policy requires that employees will retire at age 60 or as soon thereafter as they are eligible for optional retirement under the Civil Service Retirement System, i. e., upon completion of 20 years of service at age 60 or after a minimum of five years of service at age 62.

SECRET

3 1
Approved For Release 2001/05/23 : CIA-RDP84-00688R000200240001-8

C

Approved For Release 2001/05/23 : CIA-RDP84-00688R000200240001-8

SECRET

MEMORANDUM FOR:

THROUGH : Head of Career Service

SUBJECT : Retirement Planning

1. In order to assist employees in planning for their eventual retirement, it is the practice of the Agency to notify each employee at a point in service five years prior to the date of scheduled retirement. Unless your contract is sooner terminated by either party, you are scheduled to retire in _____. (new material underlined)

2. The prospect of retirement from the Agency deserves serious thought and careful planning so that you may make the transition to the next phase of life with purpose and confidence. To assist you in this regard, the Agency will make available to you various resources which are attuned to the needs of prospective retirees. In _____, the Agency will conduct a Retirement Information Seminar to which you will be invited. Your spouse, if you are married, may accompany you to this seminar. Following the seminar, you will be invited by the Retirement Counselor for your Directorate to an individual pre-retirement counseling session (or more than one, if you wish); this phase of retirement planning will be tailored solely to your own particular situation and circumstances and will be within the context of the retirement system under which you will retire. The individual counseling sessions are intended to give you a wide range of information on such matters as estimates of your annuity, survivor benefits, life and health insurance, Social Security, taxes, relocation and movement of household effects and assistance in obtaining other employment, if appropriate. In addition to the sessions with your Retirement Counselor, you will be invited to avail yourself of selected literature on all aspects of retirement.

3. Some persons who wish to retire voluntarily prior to the scheduled date, or who wish to commence their planning as early as possible, prefer to work with their Retirement Counselor well before the time he would normally contact them. If you believe you would benefit from such an earlier start on your personal planning, you are invited to contact the Retirement Counselor responsible for your Directorate. He is assigned from your Directorate to the Retirement Affairs Division, 212 Magazine Building in Rosslyn, on telephone extension 3328.

4. Experience has amply demonstrated that careful planning facilitates the transition to retirement. I recommend, strongly, that you avail yourself of the services the Agency offers you in planning your own retirement.

Harry B. Fisher
Director of Personnel

SECRET

MEMORANDUM FOR :

THROUGH : Head of Career Service


SUBJECT : Retirement Planning

1. In order to assist employees in planning for their eventual retirement, it is the practice of the Agency to notify each employee at a point in service five years prior to the date of scheduled retirement. I am, therefore, taking this opportunity to advise you that you are scheduled to retire in 1975.

2. The prospect of retirement from the Agency deserves serious thought and careful planning so that you may make the transition to the next phase of life with purpose and confidence. To assist you in this regard, the Agency will make available to you various resources which are attuned to the needs of prospective retirees. In October 1970, the Agency will conduct a Retirement Information Seminar to which you will be invited. Your spouse, if you are married, may accompany you to this seminar. Following the seminar, you will be invited by the Retirement Counselor for your Directorate to an individual pre-retirement counseling session (or more than one, if you wish); this phase of retirement planning will be tailored solely to your own particular situation and circumstances and will be within the context of the retirement system under which you will retire. The individual counseling sessions are intended to give you a wide range of information on such matters as estimates of your annuity, survivor benefits, life and health insurance, Social Security, taxes, relocation and movement of household effects and assistance in obtaining other employment, if appropriate. In addition to the sessions with your Retirement Counselor, you will be invited to avail yourself of selected literature on all aspects of retirement.

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4. Experience has amply demonstrated that careful planning facilitates the transition to retirement. I recommend, strongly, that you avail yourself of the services the Agency offers you in planning your own retirement.


Robert S. Wattles
Director of Personnel